



2023-2024

Special Circumstance Appeal Form

Student Name: _____

Last 3 Digits of Student ID: _____

The University of Mount Union understands that special circumstances occur which may affect a student's financial aid eligibility. The financial aid office will review each request for change on an individual basis. **If selected for verification by the Department of Education, you must complete verification before submitting this request.**

Please note that submission for review will not guarantee changes in financial aid nor prevent any late charges that may be applied to a student's tuition account balance. **Please do not disregard your University of Mount Union bill due date while waiting for the appeal decision.**

As part of the review process, the financial aid special circumstance committee looks at the student's current financial aid package. **It is expected that a student has accepted all financial aid resources, including federal loans, before completing the special circumstance appeal process.**

If the student's Estimated Family Contribution (EFC) is already zero (0), the appeal will not be reviewed due to the fact that the student is already eligible for the maximum federal financial aid available.

Step 1: Student and Parent tax information

You must submit 2021 & 2022 W2s, tax returns, and schedules 1, 2 & 3 (if applicable) with this form for both the student and parent.

Step 2: Check the appropriate circumstance and attached the requested documentation

Special Circumstance	PLEASE ATTACH THE FOLLOWING DOCUMENTATION:
___ Loss of Wages A wage earner became recently separated from a job (for at least 10 weeks) or recently retired.	<ul style="list-style-type: none"> Documentation indicating the last day of work and any benefits received Provide last pay stubs for both wage earners, including the parent still employed New employer pay stub showing new wages, if applicable Documentation of unemployment benefits
___ Reduction or loss of other income Benefits received in the tax year on the FAFSA, such as alimony, (taxed) social security, workers' compensation, retirement/pension, that have ceased or been significantly reduced (reduction must exceed 15% of income reflected on the FAFSA).	<ul style="list-style-type: none"> Original Benefit statement listing total amount received Revised Benefit statement and/or court documents listing updated amount to receive and effective date Documentation indicating the date of change
___ Child Support	<ul style="list-style-type: none"> Submit current and previous court orders
___ Divorce/Separation/Recently Married <u>after the FAFSA was filed</u>	<ul style="list-style-type: none"> Submit court paperwork and custodial parent's pay stub
___ Death of Parent or Spouse	<ul style="list-style-type: none"> Submit death certificate and enclose surviving parent's current pay stub
___ Private School Tuition	<ul style="list-style-type: none"> Payments of private tuition for siblings of the student who will not be enrolled in college (DO NOT include the prospective UMU student in these payments or calculation) Submit documentation showing tuition amount PAID during the tax year reflected on the FAFSA Amount must exceed 6% of parent's income and must demonstrate financial need as determined by the FAFSA



___ Unreimbursed Medical Expenses	<ul style="list-style-type: none"> • Submit proof of payment for out-of-pocket expenses or copy of Schedule A of 1040 • Documentation from health insurance showing accumulated amounts paid towards annual deductible/ out-of-pocket maximum
___ Loss of one-time income You received one-time income that will not occur in in the current tax year (e.g., rollover into a Roth IRA, moving expenses allowance, back-year Social Security payments, or a divorce settlement) Special circumstance consideration will not be given if this one-time income is a result of an inheritance, job bonus, or overtime compensation, gambling winnings, pension, capital gain, insurance settlements, or early distributions of retirement account	<ul style="list-style-type: none"> • Contracts, agency notices, or legal papers that indicate the date your (or your spouse's) one-time income was received • The amount of income came from that source • How that income was used
___ Other	<ul style="list-style-type: none"> • Please detail in the box below or upload a document explaining any other special circumstances that have not been defined above and provide supporting documentation

Step 3: Explanation

Attach a letter explaining your circumstance. Please include the effective date.

Step 4: Certification

Special Circumstance Appeal reviews will be completed within 3-4 weeks after receipt of all required documents. However, after the initial review of your submitted documents you may be notified that additional information is needed in which case the review will take longer to complete. Once the special circumstance appeal has been processed, you will be notified of any changes that resulted from your special circumstance. **Please note that a recalculation in financial need does not guarantee that additional aid will be awarded.**

I/we certify that all information and documentation that I/we have provided pertaining to this appeal is true and complete.

Student _____ Date _____

Parent's signature is required for dependent student (as determined by the FAFSA)

Parent _____ Date _____

Step 5: Email, Mail, Fax, or Drop-off Documents to the Office of Student Financial Aid

Email documents to finaid@mountunion.edu or **Mail** to the Office of Student Financial Aid, 1972 Clark Ave, Alliance, OH 44601

Fax documents M-F 8-4 to (330) 829-2814

Please do not send any personally identifiable information via email (e.g. Social Security Numbers, dates of birth, etc.)

Questions? Contact the Office of Student Financial Aid

(330)823-2674 finaid@mountunion.edu